

INSTRUCTIONS ON HOW TO USE THIS PRE-QUALIFIED POOL OF PROFESSIONAL SERVICES FOR DESIGN WORK UNDER \$60,000 PER PROJECT

CPSM - 3.1.8.2 Category B - Small Purchase Professional Services Procurement

(Code of Virginia, § 2.2-4303, G.)

Category B procurements of professional services are used for projects where the total fees (including reimbursable expenses) are expected to not exceed \$60,000. All contracts initiated as Category B procurements up to \$50,000 are set aside for DSBSD certified small businesses, with at least one proposal from a DSBSD certified micro business. Projects with fees less than \$10,000 are set aside for certified micro businesses. Projects with fees of \$10,000 up to \$50,000 are set aside for certified small businesses, including micro businesses. Contracts initiated as Category B procurements with fees more than \$50,000 and not exceeding \$60,000 are not set aside for small businesses, but the procedures of CPSM Section 3.1.6.3 for small business utilization are applicable.

PURCHASE ORDER PROCEDURES:

Fees Less Than \$10,000

When selecting an A/E by Category B procedures for a project with total fees in this range, the Agency shall:

1. Prepare a Scope of Work and provide it to one A/E who is DSBSD certified as a micro business for an interview. The A/E shall be selected from a list of A/E firms interested in providing services to the Agency on small projects. The firms shall have Form AE-1 through AE-6 on file with the Agency, shall have evidence of DSBSD certification as a micro business or small business on file with the Agency and appear to be qualified and suitable to render the required services.
2. Conduct telephone or personal interviews with representatives of the A/E to determine current personnel qualifications, location relative to the work, expertise, workload, capability to meet the proposed schedule, past performance on similar projects and ability to provide the service within budgeted costs.
3. Consideration should be given to number and value of previous agency and state contracts awarded to each firm. Agencies shall consider the opportunity to maximize the participation of qualified Virginia firms interested in doing such work for the Commonwealth and to avoid favoritism or the appearance of favoritism.
4. Determine if the A/E is qualified for the work required and, if so, negotiate the fee for services. If the fee is not fair and reasonable, informally solicit another A/E certified as a micro business from the list of interested A/E firms and follow the steps above for that A/E. Repeated selection of the same A/E firm for these small purchases violates the intent of these procedures. If, upon due diligence, it is determined that no micro businesses in this category exist, are willing to participate, or are appropriately qualified, then a DSBSD certified small business (as opposed to a micro business) may be informally solicited.
5. Award a contract and post notice of award on eVA.
6. Use Contract Form CO-3 or Form CO-3.2 and forward a copy of the signed contract to BCOM. The CO-3.2 is not appropriate for projects with fees of \$10,000 or more.
7. Issue a Purchase Order on eVA with a reference to the Contract CO-3 or CO-3.2.

Fees at Least \$10,000, Not Exceeding \$50,000

When selecting an A/E by Category B procedures for a project with total fees in this range, the Agency shall:

1. Prepare a Scope of Work and provide it to one A/E who is DSBSD certified as a micro business for an interview. The A/E shall be selected from a list of A/E firms interested in providing services to the Agency on small projects. The listed firms shall have Form AE-1 through AE-6 on file with the Agency, shall have evidence of DSBSD certification as a micro business or small business on file with the Agency and shall appear to be qualified and suitable to render the required services.
2. Conduct telephone or personal interviews with representatives of the A/E to determine current personnel qualifications, location relative to the work, expertise, workload, capability to meet the proposed schedule, past performance on similar projects and ability to provide the service within budgeted costs.
3. Consideration should be given to number and value of previous agency and state contracts awarded to each firm. Agencies shall consider the opportunity to maximize the participation of qualified Virginia firms interested in doing such work for the Commonwealth and to avoid favoritism or the appearance of favoritism.
4. Determine if the A/E is qualified for the work and, if so, negotiate the fee for service. If the negotiated fee is not fair and reasonable, provide the Scope of Work to a DSBSD certified small business, and repeat until a fair and reasonable fee is negotiated. If, upon due diligence, it is determined that no micro businesses in this category exist, are willing to participate, or are appropriately qualified, then a DSBSD certified small business may be solicited initially.
5. Award a contract and post notice of award on eVA.
6. Use Contract Form CO-3 and forward a copy of the signed contract to BCOM.
7. Issue a Purchase Order on eVA with a reference to the Contract CO-3.

Fees More than \$50,000

Contracts with a fee, or accumulation of fees, that are expected to be more than \$50,000 are not set aside for licensed DSBSD certified small businesses. However, the A/E shall submit (as part of the response to the RFP) a report of past efforts to utilize the goods and services of such businesses and plans for involvement on the proposed contract. By submitting such information with their proposal, proposers certify that all information provided is true and accurate. If a proposer fails to submit all information requested, the purchasing agency may require prompt submission of missing information after the receipt of A/E proposals. Failure to provide information required by the RFP will ultimately result in rejection of the proposal as non-responsive.